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Pastoral Council  
Finance Council  
Policies & Norms

Roman Catholic Diocese of Portland

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# Pastoral Council & Finance Council Policies & Norms

## Roman Catholic Diocese of Portland



### Introduction

In January 2005, the New Evangelization Planning Committee of the Diocese of Portland charged parishes with developing a plan for “A New Evangelization.” Reporting to Bishop Malone, the committee’s report envisioned a greatly-changed landscape for all Roman Catholics of Maine, one grounded on the “centrality of the Eucharist,” a new understanding of ministry, and a new understanding of parish.

The plan for a new evangelization called for a reorganization of the parishes within the Diocese – first, by grouping the 135 parishes into 28 (now 29) regional clusters, and second, by canonically merging parishes wherever practical.

The report states: “Theologically speaking, parishes are envisioned differently today from the past. Whereas previously, the word ‘parish’ may have conjured up a picture of a church building, today the revised Code of Canon Law, reflecting the Church’s renewed theology of parishes, describes a parish as ‘a definite **community** of the Christian faithful established on a stable basis within a *particular church*’ (i.e., Diocese) (Canon 515.1).”

The report continues by further refining this canonical definition of parish:

- A parish is where there exists a community of the faithful of sufficient size, capable of supporting and participating in the central, most important action of the Church – namely, its celebration of the Sunday Eucharist; and
- A parish happens wherever the Church’s sacraments and devotional practices are carried out; and
- A parish is where there is a sufficient number of members available to carry on the parish’s various ministries:
  - Faith formation at all age levels, but particularly at the adult level;

- Evangelization outreach to its inactive members and to the unchurched of its area, helping them find a way to come home or belong to the parish;
- Justice and charity ministries to serve those for whom God has a special love; and
- Other ministries, among them a ministry to foster vocations to serve the church in leadership positions.

The “new evangelization” demands that we revise not only our understanding of parish but also how we operate within the new organization. If we revise our definition of parish, it stands to reason that we must revise how we operate within it. Moreover, if the parish is then part of this new structure – the cluster – we will need guidelines for working together to tell anew the story of Jesus.

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*No one sews a piece of unshrunk cloth on an old cloak, for the patch pulls away from the cloak, and a worse tear is made. Neither is new wine put into old wineskins; otherwise, the skins burst, and the wine is spilled, and the skins are destroyed; but new wine is put into fresh wineskins, and so both are preserved.*  
- Matthew 9: 16-17



## Why Have a Pastoral and a Finance Council?

There are two underlying reasons for councils: first, the pastor wishes to have a group of people to consult with and to provide advice on pastoral and financial matters. Consulting the “collective wisdom” of such a group of parishioners can often lead the pastor to a wiser and more prudent decision.



Second, parishioners want to serve on a council. Responding to their baptismal call to be “priest, prophet and king”, many parishioners feel their gifts and interests lead them to provide counsel to the pastor.

The roots of councils are found in the documents of the Second Vatican Council. In addition, they have their understanding in the nature of the church. In *Lumen Gentium* (The Dogmatic Constitution on the Church) and *Gaudium et Spes* (The Pastoral Constitution on the Church in the Modern World) the church has received clear guidance and a powerful description of how it should understand itself. In particular, these documents, and others, bring to life the principles of *communion*, *collegiality*, and *subsidiarity*.

### Communion

Communion speaks of unity within parish life and the church. This unity is the basis for equality of all believers and is rooted in baptism, which can be understood as our common vocation to the ministry of the church. Each of us received such a call no matter what our position in the church. We are all called to be disciples of Christ and to help bring about the Kingdom of God. This sense of discipleship also calls us to participate in the life and ministry of the church. Pastoral and Finance Councils give us a structure and a means to exercise our communion with one another.

### Collegiality

If there is to be true communion among the baptized then there has to be collegiality between clergy and laity. Just as the pope works in relation with the bishops and bishops work in relation with priests and deacons, so must pastors work in relation with parishioners. This working together to build up the Kingdom of God is spoken of in paragraphs 33 and 37 in *Lumen Gentium*. Not only does the laity have the *right* to offer their judgment on the working of the church, but there is often a *duty* to do so. Pastoral and Finance Councils offer parishioners the opportunity to exercise their collegiality to further the mission of Christ and the Church, in union with those in holy orders.

## **Subsidiarity**

Subsidiarity is a fundamental principle of Catholic social teaching. It assumes that problems are best defined and resolved by those most closely affected by them. Subsidiarity holds that diversity and good order can only be maintained when each group/commission or person is deemed vital for the good of the Church.

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## **Foundations of the Pastoral Council**

Adding more light to the need for and role of pastoral councils is the 1983 Code of Canon Law. Canons 511-514 speak about a Diocesan Pastoral Council and the role it plays offering counsel to the Bishop. For example, Canon 511 states:

*“In each diocese...a pastoral council is to be established whose responsibility it is to investigate under the authority of the bishop all those things which pertain to pastoral works, to ponder them and to propose practical conclusions about them.”*

It follows, then, that a cluster pastoral council would provide a similar service to the pastor of that particular cluster: to investigate pastoral matters, ponder them and propose recommendations.

Canon 536 speaks directly of parish pastoral councils. It states:

*“After the diocesan bishop has listened to the presbyteral council and if he judges it opportune, a pastoral council is to be established in each parish; the pastor presides over it, and through it the Christian faithful along with those who share in the pastoral care of the parish in virtue of their office give their help in fostering pastoral activity.”*

In the Diocese of Portland, parish councils have been mandated since 1981. In 2006, Bishop Malone made “fully-functional” pastoral councils a mandate for each cluster.

## **Foundations of the Finance Council**

In the 1917 Code of Canon law and again in the 1983 Code, there is a requirement that every bishop have a Diocesan Finance Council. Canon

492 requires the establishment of a council in each diocese and canon 493 specifies its duties:

*"In addition to the functions entrusted to it in Book V, The temporal Goods of the Church, the finance council prepares each year... a budget of the income and expenditures which are foreseen for the entire governance of the diocese in the coming year and at the end of the year examines an account of the revenues."*

It follows, then, that a cluster finance council would provide a similar service to the pastor of that particular cluster: to investigate financial matters, ponder them and propose recommendations.

Additionally, a parish finance council is mandated by the universal law of the church, Canon 537, which states:

*"In each parish there is to be a finance council which is governed, in addition to universal law, by norms issued by the diocesan bishop and in which the Christian faithful, selected according to these same norms, are to assist the pastor in the administration of the goods of the parish..."*

Where the pastoral council assists in pastoral planning, the finance council looks to the finances, buildings, grounds, cemeteries, and administration of the parish.

The roles of the two councils are distinct though ideally, collaborative. As has been stated, the pastoral council assists the pastor in determining the mission while the finance council assists the pastor in soliciting funds, and managing the budget and facilities in order to carry out the mission.



# 1. Cluster Pastoral Council



A Cluster Pastoral Council (Council) is one means by which the people of God can participate in discerning the mission of Jesus and how, in a

particular time and place, this mission may be carried out.

The council's purpose is to promote community, to be a sign and witness of unity, and to assist the pastor in pastoral planning. It is usually a group of 7-12 parishioners (may be more members in larger clusters) that consults with the pastor by reason of their knowledge, competence, and/or interest in the cluster or parish.

The council is a consultative body to the pastor and, most importantly given the challenges of time and distance presented in some clusters, the coordinating and unifying structure of the Roman Catholic community. The council is the means of achieving the full participation of all parishioners in the cluster in its mission by giving all a voice in supporting, guiding, and directing the various aspects of cluster/parish life. Its members gather together the visions, hopes, and needs of the community, reflecting upon them until a consensus is reached, and translates this consensus into cluster/parish planning through the establishment of goals and objectives. The council sees that these goals and objectives are implemented by commissions and committees and are evaluated and amended annually by the faith community.

The pastoral council works with the pastor to discern God's will, to develop a vision for and to clarify the mission of the cluster. The council engages in pastoral planning by developing goals through dialogue with the various ministries and the cluster/parish at large. The council pursues its mission in connection to the larger church, aware of its *interdependence* with other clusters and parishes, the diocese, and the universal church.

## **The Role of a Pastoral Council in Planning**

The church's official documents clearly state that the study and reflection of the pastoral council enable the community to plan its pastoral program

and to fulfill it effectively. The council, then, is called to help the pastor determine the pastoral program of the cluster/parish.

Planning flows from a lived experience and a history, and it takes on flesh as it looks to the future. Every parish has been entrusted by God to gather its faithful and to assist them in their journey to holiness. While this “goal” is universal, each parish and cluster will help bring this about in different ways.

The first step, therefore, is for each cluster to articulate its own particular mission, keeping in mind the universal call to holiness. Once the mission is articulated, every recommendation of the council should flow from and help achieve this mission.

The pastoral council begins by:

1. identifying the pastoral needs of the cluster
2. prioritizing those needs
3. studying and praying how to meet the needs
4. recommending to the pastor a course of action

It is not part of the council's work, however, to implement the recommendations. Implementation is the responsibility of the pastor, the staff, the commissions, and/or any other organizations in the cluster.

Once a recommendation has been made the planning process begins again, discerning a new need and preparing to offer recommendations about it.

Because one of its responsibilities is to evaluate how well recommendations have been implemented, the council needs to stay informed of parish activities and developments in the cluster. This is accomplished through frequent and ongoing communication with the groups and commissions responsible for implementation of the pastoral plan.

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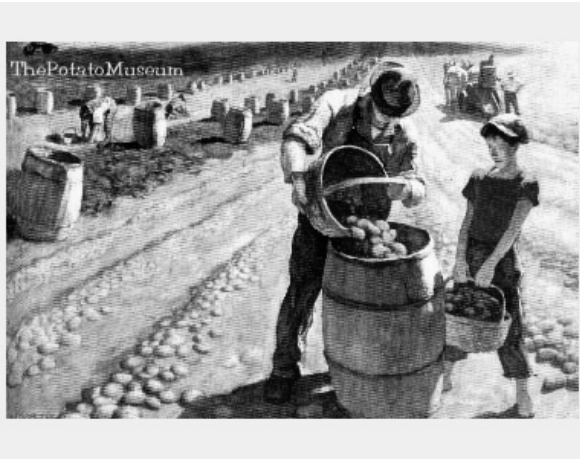
*The mission of the Pastoral Council is to “examine and consider all that relates to pastoral work and to offer practical conclusions on these matters, so that the life and activity of the People of God be brought into greater conformity with the Gospel”*  
- Pope Paul VI

## Norms for Pastoral Council

1. The Pastor or Administrator is the president of the Pastoral Council. Priests and deacons assigned to the cluster are ex officio members. Other members are appointed by the pastor/administrator from the group presented to him for nomination from the council itself or from the cluster at large. Members are never to be elected by the cluster.
2. The cluster Pastoral Life Coordinator (PLC) or other staff person designated in the absence of a PLC is staff for the council – not a member. Other paid staff of the cluster are not members of the council and generally do not attend meetings unless invited for their particular expertise. Immediate family members of paid staff are ineligible for appointment to the Pastoral Council.
3. Council members should designate, with the approval of the pastor/administrator, a member to serve as chair, another as vice-chair, and a third to serve as secretary. Terms for these position are at least for one year and renewable. In no instance is the PLC to act as chair of the council.
4. The council is to have no fewer than 7 members. There is no requirement to have equal representation from each church in the cluster. However, when a cluster is comprised of more than one parish there must be at least two members from each parish on the council. The pastor must ensure that there is balanced representation of lay men, women and religious, and individuals with varying interests, ages, and from varying geographic areas within the cluster.
5. Each pastor/administrator has one, and only one, pastoral council – whether it is a joint pastoral council representing more than one parish, or the pastoral council of a single parish that has several churches.
6. Council members are limited to two successive three-year terms. Upon completion of two terms, members must go off the council for a full year before being considered for membership again. Terms should be staggered to allow for consistency and continuity.
7. The council goes out of existence upon the transfer, retirement, resignation, or death of the pastor/administrator. A new pastor/administrator must constitute a new council as soon as possible but at least within one year of taking office.
8. The council meets in regular session a minimum of four times a year. While most meetings are open to all parishioners there can be times when the pastor/administrator may need to call for an executive session. Meetings are called by the pastor/administrator. The agenda is prepared by the council chair and approved by the pastor/administrator.

9. The council is not to meet in the absence of the pastor/administrator. Although in an emergency he can designate one of the priests or deacons to serve as his delegate.
  10. The pastor/administrator may call one or more work sessions, in addition to the regular meetings, that may take place in his absence.
  11. The council discusses any and all pastoral matters relating to the life of the people in the cluster. It does not discuss matters pertaining to individuals.
  12. In this diocese, the pastoral council is asked to approve the annual budget because of the serious impact it may have on the life and the mission of a cluster and to ensure that it is sufficient to support that mission.
  13. There may be subcommittees or commissions of the council, either one of each or several of each for the various churches in the cluster. Typically, these subcommittees/commissions may include:
    - 13.1. Evangelization and catechesis
    - 13.2. Worship and spirituality
    - 13.3. Family life
    - 13.4. Justice and charity
    - 13.5. Stewardship and church life
  14. Reports of these subcommittees/commissions should not form the greater part of the agenda of council meetings.
  15. Each cluster must have particular statutes approved by the pastor/administrator that specify local matters like meeting time, location, the composition of commissions, and the method of selecting commission members, for example. These particular statutes, however, cannot contradict these norms.
  16. The pastoral council is a consultative body; its recommendations, therefore, are directed to the pastor/administrator and become effective only after he acts upon them.
  17. The by-laws and membership of the council must be submitted to the diocesan Office of Parish Planning for Evangelization and updated annually.
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## 2. Cluster Finance Councils



*I know what it is to have little, and I know what it is to have plenty. In any and all circumstances I have learned the secret of being well-fed and of going hungry, of having plenty and of being in need. I can do all things through him who strengthens me.*  
- Philippians 4:12

The Cluster Finance Council provides expertise and consultation through financial analysis, planning, and policy development. It ensures close observance of church and civil law in all financial, business, and administrative matters of the parish. Most importantly, it assists the pastor in managing God's bountiful gifts to us, ensuring the full resources of the people of God are appropriately put to the mission of the local and universal Church.

The Finance Council assists the pastor in such things as:

- developing and monitoring the performance of the annual budget in accord with the goals and objectives recommended by the pastoral council and approved by the pastor;
- at all meetings, the council should review an income statement listing year-to-date and most-recent month's actual and budget amounts, and an accurate balance sheet;
- developing and monitoring the existence and effectiveness of internal controls over the assets (temporal goods) of the parish.
- monitoring investments in accord with diocesan policy;
- developing a thorough and understandable financial report to be presented to all parishioners annually;
- overseeing the maintenance of parish financial records, manuscripts, deeds, titles, and census information;
- ensuring that an accurate, detailed inventory of parish goods and resources is kept, along with a complete description and appraisal;
- studying and approving "acts of extraordinary administration." such acts occur infrequently and are defined as such by church law and diocesan regulation. They might involve the sale of parish property or a major financial transaction.

## Norms for Finance Councils



- 1) The Pastor or Administrator is the president of the Finance Council. Priests and deacons assigned to the cluster are ex officio members. Other members are appointed by the pastor/administrator from the group presented to him for nomination from the council itself or from the cluster at large. Members are never elected by the cluster.
- 2) The cluster Business Coordinator (CBC) or other staff person designated in the absence of a CBC is staff for the council – not a member. Other paid staff of the cluster are not members of the council and generally do not attend meetings unless invited for their particular expertise. Immediate family members of paid staff are not eligible for membership.
- 3) Council members may designate, with the approval of the pastor/administrator, a member to serve as chair, another as vice-chair, and a third to serve as secretary. Terms for these position are at least for one year and renewable. In no instance is the CBC to act as chair of the council.
- 4) The council is to have no fewer than 7 members. There is no requirement to have equal representation from each church in the cluster. However, if the cluster is comprised of more than one parish, there must be at least two members from each parish, who with the pastor, then form the finance council for that canonical parish. The pastor must seek to find individuals qualified in accounting, finance, property management, and/or business matters and should ensure that there is balanced representation of lay men, women and religious, and individuals with various expertise, ages, and geographic areas throughout the cluster.
- 5) The pastor/administrator is to form a single cluster finance council – whether it is a joint finance council representing more than one parish, or the finance council of a single parish that has several churches.
- 6) Council members are limited to two successive three-year terms. Upon completion of two terms, members must go off the council for a full year before being considered for membership again. Terms should be staggered to allow for consistency and continuity.

- 7) The council goes out of existence one year after the transfer, retirement, resignation, or death of the pastor/administrator. A new pastor/administrator must constitute a new council in that time.
- 8) The council meets in regular session at least four times a year. While most meetings are open to all parishioners there can be times when the pastor/administrator may need to call for an executive session. Meetings are called by the pastor/administrator. The agenda is prepared by the council chair and approved by the pastor/administrator. During these meetings, the pastor/administrator may also call into session a particular parish finance council to deal with matters relating only to that parish, e.g. the sale of property.
- 9) The council is not to meet in the absence of the pastor/administrator. Although in an emergency he can designate one of the priests or deacons to serve as his delegate.
- 10) The pastor/administrator may call one or more work sessions in addition to the regular meetings that may take place in his absence.
- 11) The council discusses any and all temporal matters relating to the life of the people in the cluster. It does not discuss matters pertaining to individuals.
- 12) There may be subcommittees of the council, either one of each or several of each for the various churches in the cluster. Typically, these subcommittees may include:
  - a. Property
  - b. Budget
  - c. Development
  - d. Cemetery, if applicable
- 13) Reports of these subcommittees/commissions should not form the greater part of the agenda of council meetings.
- 14) Each cluster must have particular statutes approved by the pastor/administrator that specify local matters like meeting time and location, number of meetings, the composition of commissions, and the method of selecting commission members, for example. These particular statutes, however, cannot contradict these norms.
- 15) The finance council is a consultative body; therefore, its recommendations are directed to the pastor/administrator and become effective only after he acts upon them.
- 16) Within the first quarter of each year, the by-laws and membership of the council must be updated and submitted to the diocesan Finance Office.
- 17) Within the first quarter of each year, the pastor/administrator and finance council members will sign a statement to the Bishop. This statement is to contain the names and professional titles of the parish finance council members; dates when the council met during the preceding fiscal year; and date(s) when the approved parish financial

statements/budgets were made available to the parishioners. A copy of the published parish financial statements is to be provided to the Bishop along with this statement. A sample statement is included in Appendix [2](#).

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## **Appendix 1: Key Words for Understanding Council Ministry**

- Accountability – The obligation to carry out responsibility and to exercise authority in terms of established standards or assigned tasks.
- Administrator – A priest assigned by the bishop, on a temporary basis, to serve a parish or cluster in the absence of a pastor.
- Clergy – Those who are ordained to the orders of deacon, priest, or bishop, including ordained members of congregations of religious men.
- Collaboration – Working together as a joint effort.
- Commission – A group that develops recommendations concerning such areas of parish life as worship, faith formation, and liturgy. Commissions address parish vision/goals within the context of a specialized area of ministry. A commission typically recommends actions to and acts on decisions from the Finance Council and/or Pastoral Council.
- Committee – A group involved in a parish ministry, project or program that flows from parish priorities and cluster strategic planning. Committees are sometimes stable – buildings and grounds, for example – or temporary – a parish/cluster supper, for example.
- Deacon (permanent) – A man who is ordained to the order of deacon and who will remain such.
- Deacon (transitional) – A man who has been ordained to the diaconate but who, ultimately, will be ordained to the priesthood.
- Discernment – The process that promotes a community's ability to seek God's will in the life of the community.
- Goal – a clear statement of a desired direction or end expressed in broad, general terms.
- Immediate Family Members - spouse, child, parent, grandparent, grandchild, brother, sister, in-laws or anyone living in the employee's household
- Laity – Or Lay People. Baptized members of the Roman Catholic Church who are not ordained.
- Lay Ecclesial Minister - One to whom a formal and public role in ministry has been entrusted or upon whom an office has been conferred by competent ecclesiastical authority. A paid staff person (full- or part-time) or a volunteer who has responsibility and

the necessary authority for institutional leadership in a particular area of ministry

- Mission of The Roman Catholic Church – the mission of the Roman Catholic Church is to proclaim the gospel, celebrate the sacraments, witness to the gospel, serve all in need.
- Mission Statement – Statement of a group's reason for being, its purpose clearly and succinctly expressed. Every activity is tested against the mission statement and evaluated as to its effectiveness in furthering the purpose for existence.
- Objective – A specific, time-oriented and realistic statement of what the group or individual is going to do, who will do it, for whom, when, and how.
- Parish – A definite community of believers, established on a stable basis by the bishop of a diocese within his diocesan church. Care of a parish is entrusted to a pastor or administrator appointed by and responsible to the bishop. The community of Christian faithful carries out the mission of the church in a given locale by forming and educating its members in the faith, proclaiming the Gospel and serving those in need. Parish structures promote the mission of the parish, diocese and universal church.
- Parochial Vicar – A priest assigned by the bishop to minister in a parish or cluster as the pastor's co-worker and under the pastor's authority. Parochial vicars at one time were known as "assistants" or "associate" pastors.
- Pastor – A priest designated by the bishop to assume pastoral responsibility for a parish community.
- Pastoral Staff – Those responsible for collaborating with the pastor in implementing goals/programs/policies of the parish and/or cluster. These may be paid or volunteer staff.
- Policy – A directive or mandate for action. Answers the question, "In what direction do we want to go?"
- Religious Women and Men – Women and men (i.e., brothers, nuns, priests, sisters) who have chosen to live a vowed life in the context of a particular religious community. Each serves the church according to the charisms and ministries particular to her/his congregation. If a member of the community is ordained he belongs to the Clergy. All other religious are members of the Laity.
- Subsidiarity – A time-honored Catholic social principle that holds that nothing is to be done or decided by a higher group, agency, or level of authority that can be done or decided more appropriately by a lower group, agency, or level of authority.

## **Appendix 2: Sample Annual Finance Council Statement to the Bishop of Portland**

[to be added]